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**SUBMIT DIRECTLY TO THE OFFICE OF PUBLIC RECORDS IN 232 HART BUILDING**

**January 29, 2019**

(Date)

*(Signature of Traveler)*

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## PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should NOT submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors): CONGRESSIONAL INSTITUTE
2. Description of the trip: An educational policy conference to examine important issues with policy experts and Members of the House and Senate.
3. Dates of travel: January 31 - February 2, 2018
4. Place of travel: White Sulphur Springs, WV
5. Name and title of Senate invitees: See Attached List
6. I certify that the trip fits one of the following categories:
  - ☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
  - OR -
  - ☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I certify that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
  - AND -
  - ☒ I certify that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I certify that:
  - ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
  - AND -
  - ☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

**9. USE ONLY IF YOU CHECKED QUESTION 6(B)**

**I certify that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:**

- ☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

-OR-

- ☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (see questions 6 and 10).

- OR -

- ☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

**10. USE ONLY IF YOU CHECKED QUESTION 9(B)**

**If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:**

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11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

- 12. Briefly describe the role of each sponsor in organizing and conducting the trip:**

**The Congressional Institute is the sole organizer and conductor of this event.**

\_\_\_\_\_

- 13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:**

**The purpose of the Congressional Institute (a 501(c)4 organization) is to promote**

**public education about Congress and to hold educational conferences for Members**

of Congress, staff and others.

**The Congressional Institute has a long history of sponsoring educational conferences**

**for Members of Congress and staff. The Institute also sponsors retreats for Chiefs**

**of Staff and Legislative and Communication Directors.**

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15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

**The Institute conducts important research projects consistent with its mission and develops resources such as a House Floor Procedures Manual and the book Surviving Inside Congress. The Institute also manages the Congressional Art Competition.**

- 16. Total Expenses for Each Participant:**

|   | Transportation Expenses          | Lodging Expenses               | Meal Expenses               | Other Expenses                                       |
|---|----------------------------------|--------------------------------|-----------------------------|--|
| <input checked="" type="checkbox"/> Good Faith estimate | \$267                            | \$93 + tax                     | \$64                        | \$223<br>Facility Rental                             |
| <input type="checkbox"/> Actual Amounts                 | Spouse (if applicable):<br>\$267 | Spouse (if applicable):<br>\$0 | Spouse (if applicable):\$64 | Spouse (if applicable)::<br>\$157<br>Facility Rental |

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

**This event is arranged and organized specifically with regard to congressional participation.**

- 18. Reason for selecting the location of the event or trip**

**Relative proximity to Washington DC and capability to handle a large event and the associated security that accompanies it.**

- 19. Name and location of hotel or other lodging facility:**

**The Greenbrier, 300 W Main St, White Sulphur Springs, WV 24986**

20. Reason(s) for selecting hotel or other lodging facility:

### **Proximity to DC, facility size, Security and availability**

**21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:**

**Lodging: Per Diem: \$93 vs. Our room rate: \$93**

**Meals: Per Diem (2 half days): \$76.50 vs. our meal costs: \$64**

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

**Attendees will travel via charter coach-class train to the Greenbrier and by bus on the return trip.**

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

**N/A**

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

**Signature of Travel Sponsor;**

**Name and Title:** Mark Strand, President

**Name of Organization:** Congressional Institute

**Address: 1700 Diagonal Road #730, Alexandria, VA 22314**

**Telephone Number: 703-837-8812**

**Fax Number: 703-837-8817**

**E-mail Address: Strand@conginst.org**

## **PRIMARY TRIP SPONSOR FORM ADDENDUM**

### **Question 16: Other Expenses:**

The estimated lodging rate and per participant food/refreshment expense figure for this event (and provided on this form) do not include the separate costs to the Congressional Institute to rent conference/banquet space large enough to accommodate this large event with appropriate security and audio/visual capabilities necessary to conduct our program. Dividing these conference and facility rental costs by the number of participants estimated to attend this event, the estimated figure would be \$223 as disclosed on the sponsor form.

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Matt  
Chandler  
Sharon  
Don  
Emily  
Erica  
Terry  
Ryan  
Kathy

Sandgren  
Smith  
Soderstrom  
Stewart  
Stotmelster  
Suarez  
Van Doren  
Wrasse  
Wright

Office of Senator Hatch  
Senate Republican Conference  
Office of the Senate Majority Leader  
Office of the Senate Majority Leader  
Senate Republican Conference  
Office of the Senate Majority Leader  
Office of the Senate Majority Leader  
Senate Republican Conference  
Office of the Senate Majority Leader

Chief of Staff  
Communications Director  
Chief of Staff  
Deputy Chief of Staff  
Staff Assistant  
  
Policy Advisor  
Communications Director  
Policy Advisor for Nominations